

Message Text

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FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 2385

INFO ALL AMCONSULS IN CANADA

UNCLAS SECTION 1 OF 3 OTTAWA 3104

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SUBJECT: EXPORT PROMOTION QUESTIONNAIRE.

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1. COMMERCIAL COUNSELOR HAS INTERVIEWED SEVERAL OFFICIALS AT DEPARTMENT OF INDUSTRY, TRADE AND COMMERCE (ITC) TO GATHER FACTS AND IMPRESSIONS SUPPLEMENTING THOSE REPORTED BY EMBASSY SINCE JULY 1971. THUS, FROM DECEMBER 12 TO 20 COMMERCIAL COUNSELOR SAW ASSISTANT DEPUTY MINISTER (ADM) FOR EXPORT DEVELOPMENT; DIRECTOR OF SPECIAL PROJECTS BRANCH; ACTING CHIEF OF PROGRAM OFFICE, EXPORT MARKET DEVELOPMENT; GENERAL DIRECTOR OF REGIONAL OFFICES BRANCH; DIRECTOR OF FAIRS AND MISSION BRANCH; ACTING GENERAL DIRECTOR AND DIRECTOR OF WESTERN HEMISPHERE BUREAU; GENERAL DIRECTOR OF PACIFIC, ASIA AND AFRICA BUREAU AFFAIRS BRANCH; AND CHIEFS OF PACIFIC AND ASIA DIVISIONS. FINDINGS FROM THESE INTERVIEWS AND UP-TO-THE MINUTE REPORTS FROM OUR CONSULATES GENERAL ARE SET FORTH BELOW. PARAGRAPH NUMBERS CORRESPOND TO PARAS. 2 TO 13 REFTEL.

2. ITC ITSELF HAS BEEN REORGANIZED SINCE JULY 1971 WITH OBJECTIVES, I.A., OF BRINGING ABOUT A BETTER COORDINATION BETWEEN TRADE AND INDUSTRY BRANCHES WITHIN THE DEPARTMENT AND, WITHIN THE FOREIGN TRADE RUBRIC, MARRYING EXPORT DEVELOPMENT PROGRAMS (MARKETING) AND INTERNATIONAL TRADE
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RELATIONS ACTIVITIES (THE TRADING CLIMATE OR ENVIRONMENT)

UNDER THE SENIOR ADM FOR INTERNATIONAL TRADE. (THERE IS ALSO A SENIOR ADM FOR INDUSTRY IN ITC AS REORGANIZED WHO SUPERVISES THE WORK OF THE LINE, I.E., COMMODITY BRANCHES.) ORGANIZATION CHARTS FOR ITC AS OF NOVEMBER 1973 AND, FOR COMPARISON PURPOSES, APRIL 1971 BEING AIRPOUCHED TO OFFICE OF ECONOMIC RESEARCH (OER) OF BUREAU OF INTERNATIONAL COMMERCE (BIC). THE ONLY OTHER MAJOR CHANGE SINCE JULY 1971 HAS BEEN THE INSTITUTION OF THE PROGRAM FOR EXPORT MARKET DEVELOPMENT (PEMD), UNDER WHICH FIVE DISTINCT SCHEMES OR "SECTIONS" HAVE THUS FAR BEEN LAUNCHED AND ARE OPERATING SUCCESSFULLY. (NEW, ADDITIONAL SECTIONS PRESENTLY UNDER CONSIDERATION INVOLVE, E.G., ASSISTANCE TO COMPENSATION/SWITCH TRADING COMPANIES AND TURNKEY PROJECTS.) OTTAWA A*-554 F OCTOBER 23, 1973, A-198 OF APRIL 26, 1973, A-192 OF APRIL 19, 1973 AND A-453 OF JULY 26, 1972 PROVIDE COMPLETE INFORMATION ON A CURRENT BASIS ABOUT THE CHARACTER, INCLUDING MOTIVATION, AND SUCCESS OF THESE NEW PROGRAMS, TOGETHER WITH INDICATIONS OF HOW THE DEGREE OF SUCCESS HAS BEEN MEASURED. ITC'S MEASURE OF SUCCESS HAS BEEN THE GRATIFYING RESPONSE (NUMBER OF APPLICATIONS) FROM CANADIAN BUSINESSMEN AND THE THIRTY TO ONE RATIO OF NEW EXPORT BUSINESS GENERATED TO GOVERNMENT INVESTMENT OF FUNDS.

3. ALL ITC OFFICIALS INTERVIEWED CANDIDLY SAID THEY COULD NOT ANSWER QUESTIONS 3 AND 4 DEFINITELY. TO SOME EXTENT, ITC IS LOCKED INTO PROGRAMS; AND WHILE COGNIZANT OFFICIALS THOUGHT THEY HAD "PRETTY GOOD HANDLES" ON SOME PROGRAMS, SUCH AS FAIRS AND MISSIONS, THEY ALSO SAID THEY HAD DIFFICULTY, GENERALLY SPEAKING, IN TYING PARTICULAR EXPORT SUCCESSES TO ANY PARTICULAR PROGRAM. ON THE OTHER HAND, ONE OFFICIAL SAID HE WAS TRYING TO PROMOTE A SYSTEMS APPROACH TO MARKETS, E.G., "PROJECT GERMANY", A FIVE-YEAR PROGRAM TO INCREASE CANADA'S SHARE OF THAT MARKET. THERE ARE NEVER SUFFICIENT FUNDS FOR ALL THE EXPORT PROMOTION ACTIVITIES ITC IN OTTAWA WOULD LIKE TO UNDERTAKE. POST FORECASTS OR, IN CURRENT U.S. TERMINOLOGY, COUNTRY COMMERCIAL PROGRAMS, ARE DEVELOPED ANNUALLY BY THE TRADE COMMISSIONERS ABROAD (AS PART OF THE TOT*L GOC PROGRAM FOR EACH OF ITS FOREIGN MISSIONS). THESE FORECASTS ARE REVIEWED BY ITC'S REGIONAL, MARKETING AND LINE BRANCHES WITHIN BUDGETARY CONSTRAINTS. ABOUT \$15 MILLION ANNUALLY, INCLUDING \$4,250,000 FOR PEMD AND \$3,500,000 FOR THE PROGRAMS

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OF THE FAIRS AND MISSION BRANCH, IS CONSIDERED TO BE THE EXPORT PROMOTION BUDGET, AND THIS TOTAL COVERS SALARIES AND EXPENSES OF ALL THE ITC PERSONNEL ENGAGED, ABROAD AND DOMESTICALLY. EMBOFF WAS UNABLE TO ASCERTAIN PRECISELY HOW THESE FIGURES WERE DECIDED UPON. THE USUAL EXPLANATION WAS THE TUG AND HAUL OF THE BUDGETING PROCESS WITHIN A DEMOCRATIC SYSTEM, OR LAST YEAR'S BUDGET PLUS EITHER A PERCENTAGE FACTOR OR PROVISION FOR NEW OR DIFFERENT EMPHASIS OR BOTH.

4. AS FOR DATA ON MONITORING AND/OR EVALUATING SPECIFIC PROGRAMS AGAINST PREDETERMINED GOALS, EMBOFF WAS TOLD THESE DATA ARE NOT READILY AVAILABLE. IN THE CASE OF PEMD, SUCH DATA ARE RESTRICTED TO ITC AND TREASURY BOARD (THE GOC'S EQUIVALENT OF THE OMB) AND WERE NOT EVEN MADE AVAILABLE TO PARLIAMENT BECAUSE OF COMMERCIAL CONFIDENTIALITY. ONE PERFORMANCE MEASUREMENT FREQUENTLY MENTIONED BY ITC OFFICIALS WAS RATIO OF EXPORT SALES TO GOC "INVESTMENT". THIS RATION VARIED WITH PROGRAMS FROM TWENTY-TO-ONE TO FIFTY-TO-ONE AND VARIED ALSO FOR SINGLE PROGRAMS DEPENDING ON THE TIME FRAME. ONE ITC OFFICIAL COMMENTED, "WE CANNOT TURN HORDES OF PEOPLE LOOSE TO MEASURE SOMETHING SO NEBULOUS".

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5. SOME OF THE TEN PROVINCES, ESPECIALLY QUEBEC AND ONTARIO, ARE VERY ACTIVE IN EXPORT PROMOTION. MANITOBA, SASKATCHEWAN, ALBERTA AND BRITISH COLUMBIA ALSO ARE ACTIVE. NEW BRUNSWICK, NOVA SCOTIA, PRINCE EDWARD ISLAND AND NEWFOUNDLAND ARE MUCH LESS ACTIVE, EXCEPT FOR PROMOTING TOURISM, ESPECIALLY FROM THE UNITED STATES. CITY AND OTHER LOCAL GOVERNMENTS PRETTY MUCH CONFINE THEIR EFFORTS TO ATTRACTING INDUSTRY FROM OUTSIDE. QUEBEC AND ONTARIO DEFINITELY DESIGN THEIR PROGRAMS TO COMPLEMENT THE FEDERAL EXPORT PROMOTION EFFORT. FROM BOTH THE OTTAWA AND PROVINCIAL VIEWPOINTS THERE APPEARS TO BE SATISFACTORY COOPERATION AND COORDINATION. THIS HAS BEEN FORMALIZED TO THE EXTENT OF EXCHANGES OF LETTERS BETWEEN THE DEPUTY MINISTER FOR ITC AND THE DEPUTY MINISTERS OF THE PROVINCIAL DEPARTMENTS OF INDUSTRY AND COMMERCE. THESE DEPUTY MINISTERS

MEET TOGETHER TWICE A YEAR, ONCE IN OTTAWA AND ONCE ELSE-WHERE. WHEN PROVINCIAL TRADE MISSIONS ARE ORGANIZED -- ONTARIO SENDS MANY OF THESE ABROAD -- ONE OF THE DIRECTORS OF ITC'S RESPECTIVE (NINE) REGIONAL OFFICES OFTEN ACCOMPANIES THE MISSIONS. WHEN INCOMING BUYERS UNDER THE FAIRS AND MISSION BRANCH PROGRAM (NOT SECTION "D" OF PEMD WHICH IS A DIFFERENT KIND OF INCOMING BUYERS PROGRAM) COME TO CANADA, THERE IS EXCELLENT COOPERATION BETWEEN OTTAWA, THE NINE REGIONAL OFFICES AND THE PROVINCIAL AUTHORITIES IN GIVING THESE PROSPECTIVE BUYERS OPTIMUM EXPOSURE TO CANADIAN INDUSTRY. THE PROVINCE OF QUEBEC, FOR EXAMPLE, HAS FIFTEEN REGIONAL OFFICES UNDER THE PROVINCIAL DEPARTMENT OF INDUSTRY AND COMMERCE, WHICH, WORKING WITH ITC, ARE ABLE TO PINPOINT EXACTLY WHERE IN QUEBEC THE POTENTIAL

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BUYERS OF ANY PRODUCT OR SERVICE SHOULD GO. AGAIN, WE HAVE NOT BEEN ABLE TO OBTAIN ANY PRECISE DATA ON PROGRAM EFFECTIVENESS; ALTHOUGH EMBOFF WAS TOLD THAT INCOMING BUYERS UNDER THE FAIRS AND MISSION BRANCH PROGRAM ARE GROWING "EXPONENTIALLY" - 65 IN 1970; 103 IN 1971; 147 IN 1972; 220 IN 1973; AND A PROJECTED 332 IN 1974, AND THE FIFTY-TO-ONE RATIO CITED IN PARA. 4 ABOVE WAS APPLIED TO THIS PROGRAM BY THE BRANCH DIRECTOR, DEPENDING ON THE TIME FRAME. THIS WAS HIS MOST SUCCESSFUL PROGRAM, HE SAID, AND THE MAJORITY OF BUYERS COME FROM THE UNITED STATES.

6. NO. EMBOFF WAS TOLD NO RPT NO FULL-FLEDGED MARKET REPORT IS MADE FOR ANYONE. RATHER, THE TRADE COMMISSIONERS GATHER GENERAL DATA TO THE BEST OF THEIR ABILITY, AND RARELY ARE ABLE TO GO INTO ANY DEPTH.

7. THE TOTAL BUDGET FOR ALL OF PEMD'S FIVE EXISTING SECTIONS IS \$4,250,000 FOR CANADIAN FISCAL YEAR '74 AND THE SAME FIGURE FOR CANADIAN FISCAL YEAR '75. NO BREAKDOWN IS AVAILABLE ACCORDING TO THE OFFICIALS WHO RUN PEMD. ITC EXPENDITURES UNDER PEMD HAVE NOT REACHED ANY CEILINGS BECAUSE: (1) COMPANIES ARE NOT NECESSARILY CLAIMING WHAT THEY ARE ENTITLED TO BECAUSE "SOME OF THEM SMELL SUCCESS IN THE MARKET-PLACE" AND DO NOT WISH TO RECEIVE GOC FUNDS WHICH THEY WILL LATER HAVE TO REPAY, AND (2) OTHERS WAIT AS LONG AS EIGHTEEN MONTHS AFTER THEIR APPLICATIONS UNDER ONE OR ANOTHER PEMD PROGRAMS HAVE BEEN APPROVED TO MAKE THEIR CLAIMS (AND PEMD HAS ONLY EXISTED A LITTLE OVER TWO YEARS). THE NEED PEMD WAS DESIGNED TO FULFILL WAS "TO GET PEOPLE OVER THE HUMP" OR HELP THEM OVER INITIAL OBSTACLES IN UNKNOWN MARKETS WHERE THE RISKS MIGHT BE HIGH AND THE RETURN LOW. THE WHOLE IDEA HAS BEEN TO ENCOURAGE CANADIAN FIRMS TO LOOK AT AND TRY OUT HITHERTO UNTAPPED MARKETS. PLEASE SEE OTTAWA AIRGRAMS CITED PARA. 2 ABOVE FOR COMPLETE AND UP-TO-DATE REPORTING ON PEMD SINCE ITS INCEPTION.

8. PLEASE SEE OTTAWA A-554 OF OCTOBER 23, 1973 REPORTING ALL AVAILABLE INFORMATION ON SECTION "E" OF PEMD. THIS PROGRAM WAS ONLY LAUNCHED IN MID-OCTOBER AND, WHILE IT IS REALLY TOO EARLY TO KNOW TO WHAT EXTENT THIS OPTION IS BEING UTILIZED, EMBOFF WAS TOLD THAT ITC HAS ALREADY RECEIVED TWO APPLI-UNCLASSIFIED

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CATIONS FOR FINANCIAL ASSISTANCE UNDER SECTION "E".

9. THE CANADIAN DRIVE TO RAISE THE AVERAGE LEVEL OF LABOR INTENSITY OF EXPORTS TO JAPAN ACTUALLY GOES BACK TWELVE YEARS, WHEN THE CANADIANS COMMENCED PRESSING THE JAPANESE TO LIBERALIZE IMPORTS. THE PRESENT PHASE OF THE DRIVE DATES FROM A 1971 SPEECH BY THEN ITC MINISTER JEAN-LUC PEPIN IN VANCOUVER, FOLLOWING WHICH HE LED A TRADE MISSION TO JAPAN IN EARLY 1972. HE WAS SEEKING "A BALANCE OF ACCESS" TO JAPAN FOR CANADIAN PRODUCTS. THE JAPANESE HAVE RESPONDED WITH TOP-LEVEL, E.G. KEIDANREN, ENCOURAGEMENT OF MANUFACTURED IMPORTS FROM CANADA, BUT THIS HAS NOT FILTERED DOWN TO MIDDLE MANAGEMENT IN INDUSTRY, THE SPECIFICATION WRITERS. THE JAPANESE ALSO HAVE RESPONDED WITH SHOPPING MISSIONS TO CANADA FROM THEIR MAJOR TRADING HOUSES. IT TURNS OUT, HOWEVER, THAT THE JAPANESE REALLY ARE INTERESTED IN JOINT VENTURES AIMED ESPECIALLY AT SALES IN THIRD MARKETS, INCLUDING THE UNITED STATES. THE COGNIZANT ITC OFFICIALS BELIEVE THE JAPANESE HAVE NOW LIBERALIZED IMPORTS TO AN EXTENT WARRANTING GREATER CANADIAN PROMOTIONAL EFFORTS. THEY BELIEVE ALSO THEY HAVE MADE SOME HEADWAY IN OVERCOMING "TRADE RELUCTANCE" TOWARDS JAPAN ON THE PART OF BOTH CANADIAN OFFICIALS AND PRIVATE BUSINESSMEN. THESE ITC OFFICIALS ACKNOWLEDGE THAT CANADIAN BUSINESSMEN HAVE NOT TRIED HARD ENOUGH IN THE JAPANESE MARKET, BUT BELIEVE THIS IS NOW IMPROVING A BIT. ITC HAS OBTAINED "A LITTLE EXTRA MONEY" FOR SEVERAL TRADE MISSIONS AND SOME ADVERTISING IN JAPAN, AND IS CONCENTRATING ALSO ON EMPLOYING PEMD AND THE PROGRAMS OF THE FAIRS AND MISSION BRANCH AS AIDS TO INTRODUCE CANADIAN BUSINESS TO THE JAPANESE MARKET. ALSO, ITC OFFICIALS NOW HAVE CONCRETE, DETAILED PROPOSALS TO ESTABLISH A TRADE CENTER IN TOKYO (NOT PARIS AS ORIGINALLY CONTEMPLATED). NO GREAT RESULTS IN DOLLAR TERMS HAVE BEEN ACHIEVED YET, BUT ITC OFFICIALS SEEM ENCOURAGED, CITING AUTOMOTIVE PARTS AND COMMUNICATIONS EQUIPMENT AS PRODUCTS THAT SHOULD BE LIKELY STARTERS. SOME CONTRACTS HAVE BEEN SIGNED, OTHERS ARE UNDER NEGOTIATION, AND THE NUMBER OF SERIOUS INQUIRIES FROM JAPAN HAS INCREASED. NOT ENOUGH HAS BEEN ACCOMPLISHED, HOWEVER, TO AFFECT SIGNIFICANTLY THE "ROCKS AND LOGS" CHARACTER OF CANADA'S EXPORTS TO JAPAN.

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10. PLEASE SEE CALGARY'S A-141 OF SEPT 12, 1973 OF THE ALBERTA EXPORT AGENCY. ADDITIONAL MATERIAL BEING AIRPOUCHED TO OER INCLUDES SMALL FOLDER ENTITLED "ALBERTA EXPORT AGENT" AND 11-PAGE EXPOSITION ENTITLED, "INITIAL DESIGN OF THE EXPORT AGENCY".

11. NO. (IN FACT, SECTIONS "B" AND "D" OF PEMD CANNOT BE USED IN THE UNITED STATES, AS THE MARKET IS CLOSE AND KNOWN.) SOME OF ITC'S PROMOTIONAL PROJECTS ARE, HOWEVER, EMPLOYED EXTENSIVELY IN THE U.S. BECAUSE "THAT'S WHERE THE MARKET IS." EXAMPLES ARE THE INCOMING BUYERS PROGRAM ADMINISTERED BY THE FAIRS AND MISSION BRANCH AND THE RELATIVELY NEW PROGRAM TO SELL CANADIAN BOOKS ABROAD (OTTAWA A-726 OF DECEMBER 11, 1972).

12. SHORT TERM EXPORT FINANCING PLAN UNDER ONTARIO'S EXPORT SUPPORT PROGRAM IS STILL IN EXISTENCE. SINCE ITS INCEPTION IN FEBRUAR 1972, NINETY-THREE LOANS TOTALLING \$19 MILLION HAVE BEEN MADE. LOANS ARE NOT MADE IF FUNDS AVAILABLE FROM FEDERAL GOVERNMENT PROGRAMS OR BANKING SOURCES. ADDITIONAL MATERIAL SUPPLIES BY CONSULATE GENERAL TORONTO BEING AIRPOUCHED TO OER.

13. THE EMBASSY'S COMMERCIAL COUNSELOR HAS FORMED THE IMPRESSION DURING TWO YEARS OF SERVICE IN
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OTTAWA--AND THIS IMPRESSION WAS CONFIRMED IN CONCENTRATED INTERVIEWS DECEMBER 12-20 WITH FOURTEEN SENIOR ITC OFFICIALS--THAT PPBS PLANNING AND EVALUATION FOR EXPORT PROMOTION IS EMPLOYED LOOSELY AND IN A GENERAL WAY. COMMERCIAL COUNSELOR WAS TOLD THAT PPBS HAS NOT DEVELOPED AS FAR IN THE CANADIAN CONTEXT AS IN THE UNITED STATES AND HAS "NOT CAUGHT ON HERE". ONE FAIRLY TYPICAL GENERAL COMMENT WAS, "YES, WE APPLY PPBS IN THE LOOSEST POSSIBLE SENSE, BUT WE SURE WOULD LIKE TO KNOW PRECISELY WHAT SPECIFIC GOALS AND EVALUATION DATA WE SHOULD APPLY TO OUR BROAD PROGRAMS AND DETAILED COUNTRY PROGRAMS". OTHER COMMENTS IN THE SAME GENERAL VEIN WERE, "IF WE WERE REALLY WORKING ON PPBS, GOALS WOULD HAVE TO BE ESTABLISHED AT THE VERY TOP LEVELS", AND FURTHER, "PRIORITIES CHANGE WITH MINISTERS, AND WE LOSE TRACK OF EARLIER GOALS." ON THE OTHER HAND, THE GOC IS ON A COUNTRY PROGRAMMING BASIS FOR EACH OF ITS MISSIONS ABROAD, AND THE TRADE COMMISSIONER'S PROGRAM FORECAST IS A PART OF THE COUNTRY PROGRAM. AND THERE EVIDENTLY ARE MARKETING STRATEGIES BY COUNTRY AND PRODUCT THAT ARE WORKED OUT COOPERATIVELY BY ITC'S INDUSTRY SECTOR BRANCHES, MARKETING BRANCHES, REGIONAL BUREAUS AND THE TRADE COMMISSIONERS ABROAD. IN THEORY, GOC OFFICIALS ARE PLANNING IN A 5-YEAR TIME FRAME, BUT IN PRACTICE THE FARTHEST THEY FEEL THEY CAN LOOK AHEAD WITH ANY PRACTICALITY IS TWO YEARS. AT LEAST THREE OF THE ITC OFFICIALS INTERVIEWED DECEMBER 12-20 REHEARSED THE REALITIES OF CANADA'S FOREIGN TRADE, CITING, I.A., THE PREPONDERANCE OF CANADA'S TRADE WITH THE UNITED STATES, THE IMPORTANCE IN THIS TRADE AND IN THE ECONOMY OF CANADA OF U.S. SUBSIDARIES AND THE CONSTRAINTS ON THEM REGARDING THE NATURE AND DIRECTION OF THEIR MARKETING EFFORTS. ONE ITC OFFICIAL CITED HIS OWN PREVIOUS EXPERIENCE IN THE MECHANICAL TRANSPORT BRANCH OF ITC. THE BRANCH HAD ESTIMATED THAT OF TOTAL CANADIAN EXPORTS OF \$9 BILLION

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IN THIS SECTOR, THE GOC COULD HOPE TO AFFECT NO MORE THAN \$400 MILLION WORTH OF EXPORTS BY ITS PROMOTION PROGRAMS. (NINE BILLION DOLLAR FIGURE SEEMS HIGH, BUT ALTHOUGH TIME HAS NOT PERMITTED US TO PURSUE THIS, EMBASSY CAN QUICKLY IDENTIFY

COMPONENTS OF A \$6 BILLION TOTAL. THUS THE POINT
MADE SEEMS VALID.) ANOTHER OFFICIAL, CITING ALSO
THE ADDITIONAL REALITY OF CANADA'S EXPORT
DEPENDENCE ON THE WORLD NEEDS OF RESOURCES
(PETROLEUM, GAS, LUMBER, WHEAT, PULP, NEWSPRINT,
MINERALS, ETC.) SAID HALF SERIOUSLY, "IF ITC
FOLDED, OUR EXPORTS PROBABLY WOULD NOT DROP
MORE THAN A QUARTER OF A BILLION DOLLARS."
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